

THE FUND FOR A HEALTHY NEVADA



SUCCESS AND SUSTAINABILITY SURVEY

**Prepared by
Center for Health Improvement,
Social Entrepreneurs, Inc., and
Demetras Consulting Services**

Success & Sustainability Survey

Introduction

This tool is designed for grantees of The Fund for a Healthy Nevada to use in accessing the success and sustainability attributes of their organization.

Structure of the Survey

The survey is divided into twelve criteria categories; organizational identity, strategic focus and plan, leadership, programs and services, customers, quality, human resources, cost effectiveness, financial position, external relationships communication and public relations, and technology. The survey is intended to assist you in evaluating your organization based on these twelve criteria for success and sustainability.

Instructions for Completing the Survey

The Success and Sustainability Survey consists of twelve categories. Associated with each of these categories are the criteria by which the organization's success and sustainability attributes are assessed.

When using this tool, simply evaluate your organization based on the criteria included in the tool. Please check next to the criteria that most closely describes your organization. Select only one criteria. Make comments/conditions in the space provided, as this qualitative information will help support the quantitative ratings and provide you with ideas on actions to take to improve the current rating.

Once complete, please return to:

Success & Sustainability Survey
Center for Health Improvement
1330 21st Street, Suite 100
Sacramento, California 95814

Or email the survey and attachments to: jhall@centerforhealthimprovement.org

Person Completing Assessment:

Organization:

Name of Funded Program:

Date:

Geographic Location:

<input type="radio"/>	Washoe County
<input type="radio"/>	Clark County
<input type="radio"/>	Balance of the state

Organizational Identity

- ☐ The organization has not yet developed a mission and/or vision statement.
- ☐ The organization has developed a mission/vision statement, but has not updated it in the last 5 years or more.
- ☐ The organization's mission/vision statement has been updated within the past 5 years, but is not used consistently by the Board as a framework for planning and decision-making, and/or is not well understood by staff.
- ☐ The mission and long-range vision of the organization are clearly defined and understood by all Board members and staff. The mission and vision are relevant to the organization's current situation, and are regularly utilized as a framework for planning and decision-making.

Comments:

Strategic Focus and Plan

- ☐ The organization has never developed a strategic plan.
- ☐ The organization has a strategic plan in existence, but it has not been reviewed or revised in the last 3 years or more.
- ☐ The organization has a recently updated strategic plan, but the Board only reviews it annually, and/or the staff is unfamiliar with the plan.
- ☐ The organization has developed a current, comprehensive, well-defined long-range plan that is regularly reviewed, updated, and monitored at both Board and staff levels. The Board uses the Plan to set annual operating goals and make decisions about priorities.

Comments:

Leadership

- ☐ The organization lacks a community presence. Leadership at Board and/or staff level is unstable or missing.
- ☐ The organization is minimally involved in the community. Leadership at Board and/or staff level exists, but is relatively new or inexperienced.
- ☐ The organization is involved in community partnerships. Leadership at Board and/or staff level is experienced, but potentially unstable. No succession plan is in place.
- ☐ The organization is a leader in among its peers within the service community. The Board is stable, diverse, and experienced in non-profit governance. Staff leadership is stable, experienced, and well-regarded in the community. Efforts are made to develop leadership in individuals at every level of the organization, which has a well-defined succession plan in place.

Comments:

Programs & Services

- ☐ Operations and services are not clearly defined or articulated, and are often revised based on the requirements or needs of a funding source.
- ☐ Operations and services provided are clearly defined and consistent with the organization's mission/vision. However, means of service provision is similar to what it was at inception, and is not necessarily research- or evidence-based.
- ☐ All operations and services provided meet professionally recognized standards of care. Services are consistent with organization mission and vision.
- ☐ All operations and services provided exceed professionally recognized standards of care, and qualify as "best practices". Services are evaluated and updated regularly, based on information obtained through community needs assessment, current research, consumer /community/staff feedback, and cost-effectiveness.

Comments:

Customers

- ☐ The organization does not actively survey its customers for feedback or input into program design, and has some difficulty meeting the diverse needs of its target population on an ongoing basis. Users regularly report difficulty accessing services.
- ☐ The organization regularly surveys its customers for feedback or input into program design, but changes are rarely made as a result of feedback received. Consumers are not represented on the Board. Users sometimes report difficulty accessing services.
- ☐ The organization attempts to be as customer-responsive as possible. Consumers are not represented on the Board, but are regularly surveyed for feedback, which is then incorporated into program design. The organization is able to respond to the diverse needs of its target population most, but not all, of the time.
- ☐ The organization's strengths, competencies, and resources match the needs of its customers. The organization has consumer representation on the Board, conducts regular focus groups to obtain input into program design, and utilizes satisfaction survey information to inform quality improvement.

Comments:

Quality

- ☐ The organization has not defined any goals for service delivery outcomes, and data collection is limited to client demographics, # of clients served, and/or quantity of services provided. There is no formal quality management/quality improvement plan in place.
- ☐ The organization has defined some goals for service delivery, and collects data intermittently. This data is not used for quality improvement purposes, however, and is not regularly communicated to Board or staff.
- ☐ Service delivery outcomes are measured in accordance with the requirements of regulating entities and funding sources. This information may be contained in the annual report, but is not a standing item on Board or staff meeting agendas. A quality improvement plan is in place, but not always followed.
- ☐ Desired outcomes of service delivery are well-defined and can be quantified and measured. Outcomes are monitored on a regular basis, and services/outputs are adjusted as needed to achieve continuous improvement. Board and management regularly emphasize performance in meetings and other communications with staff.

Comments:

Human Resources

- ☐ The organization has a high turnover rate, and/or has difficulty recruiting and retaining qualified staff. No plan is in place for staff development.
- ☐ The organization has policies and procedures that articulate some, but not all, of the components of personnel development and management. The organization often has difficulty recruiting and retaining qualified staff as a result of insufficient resources.
- ☐ The organization has a formal plan for staff recruitment, retention, evaluation and training. However, it has not been updated in the last 3 years or more. The organization sometimes has difficulty recruiting and retaining qualified staff as a result of insufficient resources.
- ☐ The organization has a formal plan for staff recruitment, retention, evaluation, and training, and updates the plan regularly with input from staff. The organization has the resources and ability to attract and retain highly qualified personnel, as evidenced by a low turnover rate.

Comments:

Cost Effectiveness

- ☐ The organization has never performed a unit cost analysis and doesn't understand how to determine this information.
- ☐ The organization uses an oversimplified formula for determining its costs, which has resulted in undervaluing the cost of providing services and underestimating budget needs.
- ☐ The organization has conducted a unit cost analysis in the past that was an accurate reflection of its true costs at one point, but this has not been done in the past 3 years or more.
- ☐ The organization knows its true costs for producing its products and providing services. The organization has decided the appropriate mix of fixed and variable costs for its overall cost structure. A unit cost analysis is conducted at least every two years to ensure that cost information is accurate and up-to-date.

Comments:

Financial Position

- ☐ The organization is dependent on one or two revenue sources, which if reduced, would threaten the existence of the organization or its ability to provide services. Cash flow is often at risk, and no funds have been placed in reserve. No fund development plan has been established.
- ☐ The organization has several funding sources and fairly steady cash flow, but no funds have been put in reserve. A fund development plan is being formulated, but has not been put into place.
- ☐ The organization has diversified its revenue streams, and has established a fund development plan; however, no funds have been placed in reserve.
- ☐ The organization has diversified and stable revenue streams, and is not so dependent on a single funding source that loss of that funding source could jeopardize the organization's viability. Its financial management and accounting practices are conducted in accordance with GAAP, and are characterized by sufficient internal and external controls to prevent fraud. In addition to regular monitoring of budget and cash flow, the organization also engages in regular forecasting activities, and has sufficient funds in reserve to operate for 6-9 months.

Comments:

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External Relationships

- ☐ The organization has not formed any partnerships or alliances designed to integrate care or lower costs, other than cross-referral relationships with other service providers in the community.
- ☐ The organization participates in community "collaboratives" via meeting attendance and/or letters of support, but has not developed a formal mechanism for resource sharing or service integration.
- ☐ The organization actively participates with other providers in the community to problem-solve barriers to providing a seamless continuum of care. While no formal resource sharing is conducted, the organization has invested staff and planning time to improve continuity of care and/or maximization of limited resources.
- ☐ The organization works actively with other organizations to address the entire scope of consumer needs in an integrated fashion. Resources are pooled with other organizations to leverage available resources. The organization has examined and evaluated key external forces over which the organization has no direct control, but that could impact the viability of the organization. Examples include the economy, sociodemographics, political environment, technology and government regulations.

Comments:

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Communication & Public Relations

- ☐ The organization has no formal communications or marketing plan, and does not regularly engage in any methods of communicating about its services to the community. Internal communication is lacking as well.
- ☐ The organization has not developed a formal communications or marketing plan, and has informal methods of sharing information which are not consistently implemented.
- ☐ The organization is in the process of developing a comprehensive marketing plan, but has not yet implemented the plan. Methods for communication may be established for either internal or external exchange of information, but not formalized.
- ☐ Mechanisms or processes exist to ensure that information flows freely between members inside the organization and the external environment. Important trends are quickly detected and passed on to those who can act upon them. The organization has a comprehensive plan for building awareness of its services among the community and its target population and actively follows the plan.

Comments:

Technology

- ☐ The organization is unaware of current technologies available to reduce barriers to providing high quality, cost-effective services, and has not invested in any resources to research new innovations in the delivery of its services.
- ☐ The organization utilizes some basic technology to improve its efficiency/effectiveness in service delivery and operations. However, it lacks sufficient resources to expand its use of innovative technology, and the Board has not identified this as a priority for resource development.
- ☐ The organization has some technology resources available to enhance its ability to deliver services, and a plan in place to obtain the necessary resources to keep pace with technologies that can advance its ability to deliver services in the most cost-effective manner possible.
- ☐ The organization uses innovative technology appropriately in daily operation, matching technological needs to available resources and providing additional resources to fill gaps. Staff are provided with sufficient training that allows them to maximize the use of technological resources available to them.

Comments: